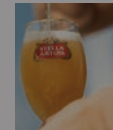
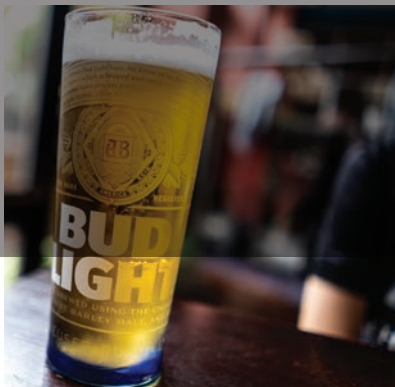


Budweiser
 BREWING GROUP UK&I™
 A PROUD PART OF ABInBev



BRAND PORTFOLIO



TRENDS TO WATCH



PREMIUMISATION

Drinkers are increasingly prepared to spend more on what they drink.

What does this mean?

- Affordable indulgence
- Premium cues e.g. font, glassware, serve rituals
- Clear pricing ladder



LESS IS MORE

Due to the pandemic, 64% continue to be unsure or have weak confidence regarding their personal financial situation.

What does this mean?

- Value for money options
- Simplify range/menu
- Loyalty programmes
- Value for money deals e.g. buckets
- Happy hours



FAST & FRICTIONLESS

42% of UK consumers admit to being more impatient today than they were five years ago.

What does this mean?

- Delivery & takeaway
- Digital engagement
- Pre-booking
- Speed of serve
- Table service
- Reduce time at bar
- Contactless payment



HEALTH, SAFETY & WELLNESS

20% of UK adults now don't drink alcohol.

What does this mean?

- Lower ABV options
- Mental wellbeing & social connections
- Alternative drinks e.g. CBD
- Hygiene & safety
- Cleaning regimes



BETTER WORLD

More than 4 in 5 people expect hospitality businesses to have some eco-friendly qualities.

What does this mean?

- Social awareness
- Brands with familiarity & trust
- Sustainability actions
- Connect with community



EXPERIENCE IS EVERYTHING

Memorable experiences, for example: sport, entertainment

What does this mean?

- Personalisation
- Theatre
- Glassware & serve



CORE

*Core lager refers to the classic beer and cider brands around 4% abv. Often consumed by loyal consumers, committed to one brand. Core lager remains by far the biggest category within lager, accounting for 46.1% of total draught lager value.



CIDER

*Cider has seen a rise in the rose/pink trend, which we know to be popular in spirits. This trend has been adopted by brands such as Magners, helping to inject new excitement into the cider category.



PREMIUM

*Premium lager can be slightly higher in abv than classic lagers. This offers consumers a choice to trade up to a more premium option, in price and quality. Budweiser Brewing Group currently hold the number #1 spot with Stella Artois, which accounts for 35.4% of all draught premium lager in the on trade.



LOW & NO ALCOHOL

*85.3% of no/low beverages purchased in the on trade is beer. This year it grew 6.4% in the no/low category.



SUPER PREMIUM

*Super-premium lager encompasses top quality brands where you charge a higher price point and are often more experimental with their range offering. Super-premium lager is the best performing category within draught lager, growing at +9.6% in value terms. Driven by consumers looking to trade up.



CRAFT BEER

*Craft keg beer has grown +8.2% in value terms, driven by the success of Camden Hells Lager and Camden Pale Ale.



PERFECT BAR



CLASSIC

These are generally drink-orientated outlets focused on lager and ale. Classic draught is central to the range of brands it stocks, but trade up options are also customary.



PREMIUM

Classic lagers may well be absent as premium 4% lagers start the beer range. Premium, super-premium lager and craft beer play a large part in the range and all have good throughputs. These outlets tend to enjoy a greater mix of drink and food-led drinking occasions.



SUPER PREMIUM

These outlets offer a mix of continental premium lager and craft beer. High-end cocktail bars often fit here.

PERFECT FRIDGE



CLASSIC



PREMIUM



SUPER PREMIUM



EFFECTIVE ARRANGEMENT

In a post-Covid world, bottle and can beverages are more important than ever, particularly as some consumers remain wary of their safety in social settings. By arranging your fridge effectively, you'll enjoy a healthy turnover. **Here are 5 things to consider when arranging your fridge:**

1. Put your most popular brands at the top of the fridge, with the most facings.
2. Cider and non-alcoholic brands should be placed at the bottom of the fridge.
3. Try not to clutter your fridge, stick to a simple well-chosen range.
4. Think about your audience, offer global brands, craft cans and gluten-free beers.
5. Most importantly, keep your fridge cold!

OUTLET TYPE

Drink-led venues – the ranges on the left-hand page are based on drink-led venues. For local bars, the range will tend to follow the 'classic' draught line up. Cocktail bars are more likely to follow the 'premium' or 'super-premium' line up.

Food-led venues – for venues serving food, it is important to think about what beverages pair well with your menu. Casual dining venues tend to stock Budweiser. For gastro pubs, craft brands are more prominent.

Entertainment venues – for venues such as sports bars, you may want to think about which brands sponsor which sports as consumers will be sent subliminal cues while watching matches. For example, Budweiser is the sponsor of the English Premier League.

LOCATION

Urban centres – in city centres, the brands expected at the bar may differ to those in more rural areas. In London, Camden Hells Lager and Camden Pale Ale are popular brands often stocked side by side, resulting in a 'halo effect' for publicans' rate of sale.

Outdoor space – if you have an outdoor area at your venue, during nice weather it makes sense to think of 'sunshine beers' such as Corona.

DRINKER PROFILE

Younger drinkers – tend to prefer session lagers that have a lower alcohol content, such as Bud Light.

Older drinkers – an ale offering is important here, think Boddingtons or Bass.

PREMIUM

THE LIFE ARTOIS

HISTORY

The classic European lager is a bottom fermented blond pilsner. It was first brewed as a special Christmas beer for the people of Leuven, Belgium. It was so successful, that it was rewarded a permanent place in the brewery's range. Since then, Stella Artois has become one of the most valuable beer brands in the world.

PARTNERSHIPS

Stella Artois is the proud sponsor of Ascot Racecourse and The Championships, Wimbledon.

BRAND VALUES

It's a simple truth: life is less rich without the company of those we love and the things we enjoy. That's why Stella Artois invites you to savour life together. We call this, The Life Artois. It's a reminder of how it feels to spend quality time with those who

matter most and to savour every pleasure life serves. Stella Artois is made with the finest Saaz hops for a distinctive taste and served in a chalice. Perfect for sharing and raising a toast to a life well lived.

QUALITY

With over 600 years of brewing heritage, Stella Artois deserves to be poured perfectly into every chalice. Our nine-step pouring ritual is a beautiful dance between the Chalice and the Draught Master, to deliver exquisite flavour with a tempting allure. Encouraging sustainable growth in the on trade, we offer the Draught Masters quality programme to customers.

In 2020, we've expanded 'La Famille Artois' for consumer preferences and different occasions. Gluten-free and Alcohol-free options, designed to be savoured. The malty middle and crisp finish of our lager reveals a full, pleasantly bitter flavour we're known for. It's what makes Stella Artois an ideal accompaniment for a variety of cuisines.



STELLA ARTOIS
4.6% | GF 4.6% | NA 0%



#1

Best selling premium draught lager in the UK on trade.



+8.3%

Volume rate of sale growth in the free trade (ahead of San Miguel, Heineken, Hop House and K1664).



#1

Most desirable* beer brand in the UK.

AVAILABLE POS



glassware coaster bar runner chalkboard serving tray neons skimmer bucket bottle opener

SUPER PREMIUM

Corona

PARADISE BEST SERVED WITH LIME

HISTORY

Born in Mexico and brought up on the beach, with a golden colour, light refreshing flavour and iconic hand painted bottle, topped off with a freshly squeezed lime. With a vast majority of our lives spent inside, we believe that it's outside where our best side shines through, that life is better lived with sand between our toes. When the living is easy, the beer is Corona.

QUALITY

Alongside the iconic Corona bottle, the Corona experience is now available on draught, allowing more drinkers to enjoy this much-loved

beer in more occasions, in fact 2/3 drinkers only consume beer on draught.¹

BRAND VALUES

Corona was born at the beach, surrounded by ocean. But today, that home is in grave danger from plastic. That's why we have teamed up with Parley for the Oceans to protect 100 islands by 2020. In 2019 alone we cleaned 5.3million of square metres of UK beach.



CORONA 4.6%



#1

Corona is the #1 world bottle in the on trade, growing by 7.8% year-on-year.



+RSP

Corona has a higher RSP (£5.15) and adds more cash in the till than competitors (Peroni £5.01, Birra Moretti £4.58, Estrella £4.73).



1 IN 3

A third of the UK state that Corona is a brand that 'they love'.

AVAILABLE POS



glassware



coaster



bar runner



parasol



chalkboard



bucket



lime rack



standee



font dangler

PREMIUM

BUDWEISER, THE KING OF BEERS

HISTORY

Budweiser, The King of Beers, launched in 1876 and is still brewed today with the same care and high quality standards. What began as an American lager is now a global brand, enjoyed by consumers in 85 countries. In-line with its original recipe, Budweiser is aged over Beachwood chips for 21 days, which results in a perfectly balanced flavour, with a smooth and a crisp refreshing taste.

PARTNERSHIPS

Budweiser is a long standing sponsor of sport leagues around the world, including a 30+ year partnership with FIFA World Cup™. More recently, the brand signed a multi-year partnership with the Premier League and La Liga as well as sponsored the 2019 Women's World Cup.

Budweiser also has a deep connection with music, highlighted through its sponsorship of the O2 and recent collaborations with multiplatinum/renowned artists around the world.

BRAND VALUES & QUALITY

Budweiser is committed to brewing beer sustainably and in 2018 signed the largest unsubsidised solar energy deal in UK history with Lightsource BP to purchase 100% renewable electricity for its UK operations. This means by 2025, 100% of Budweiser's purchased electricity will be from renewable sources.



CORE

GERMANY'S LARGEST EXPORT BEER

HISTORY

Beck's was founded on 27 June 1873 by three entrepreneurs in Bremen, Germany. Luder Rutenberg, a builder, Thomas May, a businessman and Henrich Beck, a master brewer from Bremen all shared a vision for creating exceptional beer from only the finest ingredients.

The Beck's Key is inspired by the Bremen Coat of Arms, as the key is the symbol of Bremen. Beck's is the first and largest German export beer.

QUALITY

Beck's is a true German pilsner, full of character with a distinctive aroma and dry finish.

Beck's is brewed with only three natural ingredients - hops, barley malt and water. These ingredients make up Beck's distinctively pure taste - a quality beer option at an affordable price.

BRAND VALUES

The Beck's consumer is 45-54 years old and seeks a quality beer option at an affordable price.



BUDWEISER
4.5% | Zero 0%



#1

Most loved brand amongst 18-34 year olds for on trade consumer.



#2

Budweiser is the 2nd most stocked lager brand across draught and bottle in the UK on trade.



#4

Fourth biggest beer brand in the UK.

BECK'S
4% | Beck's Blue 0%



3

3 natural ingredients - 67% of consumers agree that ingredients need to be 'natural' in the beer they consume.



2.8

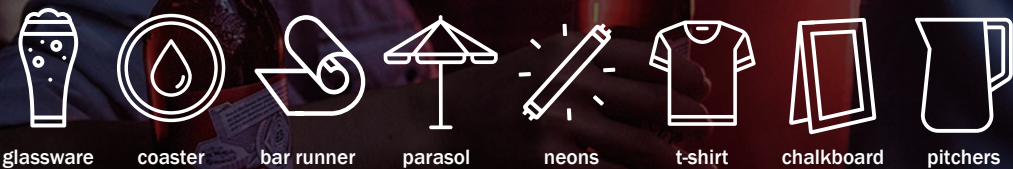
Brand desirability* for Beck's is 2.8 vs Amstel (2.5) and Coors Light (2.3).



+RSP

Beck's has a margin higher RSP than its competitors (£4.16 vs Amstel £4.14).

AVAILABLE POS



glassware coaster bar runner parasol neons t-shirt chalkboard pitchers

AVAILABLE POS



glassware coaster bar runner t-shirt

CORE



THE WORLD'S FAVOURITE LIGHT BEER

QUALITY

Bud Light is an American style lager, lightly brewed for a refreshing taste and smooth drinkability. Bud Light's taste quality is ensured by brewing to the same standards and principles as Budweiser. It delivers a refreshing, crisp and clean finish with no compromise on quality.

BRAND VALUES

Bud Light attracts a younger and more affluent consumer and is focused on recruiting new drinkers to the 'core' lager category. Through its lighter taste and fun personality. In addition, Bud Light is low in calories, with only 152

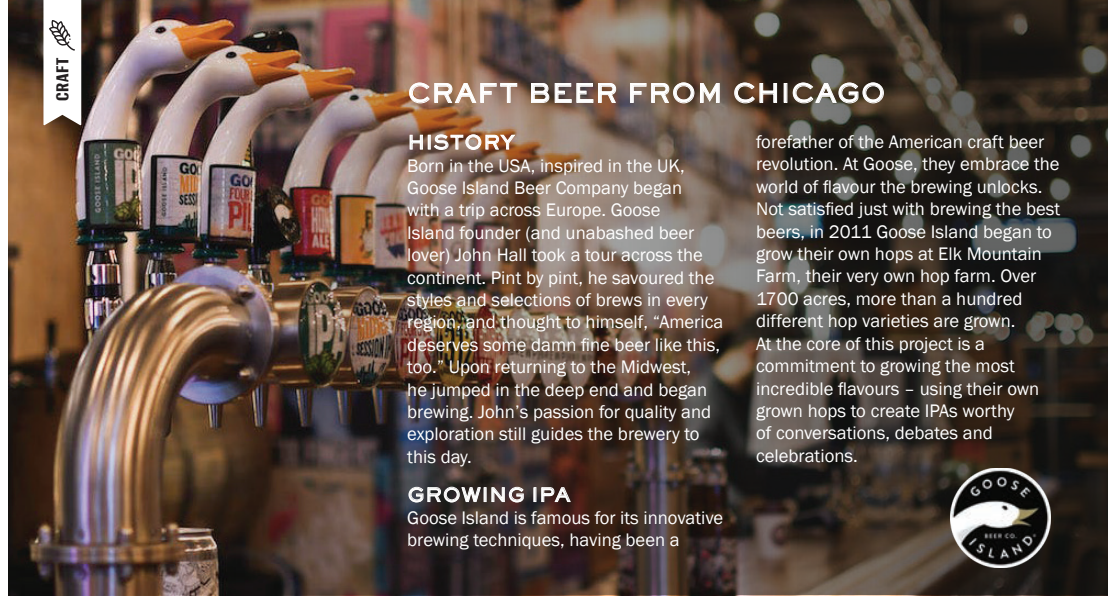
calories per pint and millennials are particularly more likely to choose a beverage based on calorie content.

PARTNERSHIPS

Bud Light sponsors the NFL and in 2018 Bud Light also became the official beer sponsor of the England Men's Football team. These sponsorships allow Bud Light to help outlets to increase footfall. Another big moment for Bud Light will be in 2021, when Bud Light sponsors the Euros.



CRAFT



CRAFT BEER FROM CHICAGO

HISTORY

Born in the USA, inspired in the UK, Goose Island Beer Company began with a trip across Europe. Goose Island founder (and unabashed beer lover) John Hall took a tour across the continent. Pint by pint, he savoured the styles and selections of brews in every region, and thought to himself, "America deserves some damn fine beer like this, too." Upon returning to the Midwest, he jumped in the deep end and began brewing. John's passion for quality and exploration still guides the brewery to this day.

forefather of the American craft beer revolution. At Goose, they embrace the world of flavour the brewing unlocks. Not satisfied just with brewing the best beers, in 2011 Goose Island began to grow their own hops at Elk Mountain Farm, their very own hop farm. Over 1700 acres, more than a hundred different hop varieties are grown. At the core of this project is a commitment to growing the most incredible flavours - using their own grown hops to create IPAs worthy of conversations, debates and celebrations.

GROWING IPA

Goose Island is famous for its innovative brewing techniques, having been a



BUD LIGHT
3.5%



31%

31% repeat purchase.



12.6%

Continues to grow 12.6% year-on-year.



101

Bud Light has a higher rate of sale than Coors Light (101 pints per week vs 98 pints per week per outlet).

AVAILABLE POS



glassware coaster bar runner parasol neons t-shirt chalkboard pitchers

GOOSE ISLAND BEER CO
Midway 4.1% | IPA 5.9% | Golden Goose 5% | Today's Haze 4.6%



6X WINNER

Goose Islands's flagship IPA is a six-time medal winner at the Great American Beer Festival.



38.4%

Session IPA is up 38.4% YOY.



#2

Goose Midway IPA is the 2nd Largest session IPA in the UK.

AVAILABLE POS



glassware coaster bar runner neons t-shirt sampling flight

SUPER PREMIUM

CAMDEN HELLS

HISTORY

What the Hells? Thanks for asking. Hells is the lovechild of our two favourite German beer styles – Helles and Pilsner. Clean, crisp and dry, it's the beer we always wanted to drink and the reason we started our brewery. We hope you agree.

BRAND VALUES

We never pasteurise our beer, for the freshest taste possible.

QUALITY

In German, the word 'lager' means 'to store' and our Hells Lager spends 4 weeks in the tank. This is the proper

length of time for lagering, the right amount of time for our Hells to acquire great depth of flavour and enough time to grow a pretty decent beard.

PARTNERSHIPS

The official beer partner of Arsenal. North London is red (and it's thirsty!). You'll find us pouring Hells and Pale on every match day, on every bar across the stadium.



CRAFT

CAMDEN PALE ALE

HISTORY

We love our American cousins. But sometimes they can be kind of full on. So we've crafted this beer to more British tastes. Made with American hops, it's still got all the punch of a pale ale. Just less shouty.

BRAND VALUES

We never pasteurise our beer, for the freshest taste possible.

QUALITY

Each year, our head brewer, Rob, goes to America for the hop harvest so he can choose the hops for our pale ale. This year, he came back with loads of delicious Simcoe and Citra. Well done Rob!



CAMDEN TOWN BREWERY
Hells Lager 4.6%



21HL

Hells has a scalable ROS in premium lager.*



£5.32

We command the highest average price per pint.**



+56%

And our growth is ahead of the lager category (+56% YOY).***

CAMDEN TOWN BREWERY
Pale Ale 4%



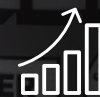
#1

Pale has the highest draught ROS in craft pale ale.*



£5.32

We command the highest average price per pint.**



+58%

And we're the fastest growing craft pale ale (+58% YOY).***

AVAILABLE POS



glassware



coaster



bar runner



neons



t-shirt

AVAILABLE POS



glassware



coaster



bar runner



neons



t-shirt

AUTHENTIC IRISH CIDER

HISTORY

Founded in Clonmel in 1935, Magners is still made from 17 varieties of apples from 150 local orchards. Aged in vats for up to 18 months, this refreshing cider is famous for being served over ice.

BRAND VALUES

Not as sweet as Stella Artois Cidre, Bulmers or Thatchers Gold, Magners is a well-rounded and perfectly balanced cider that appeals to a wide variety of drinkers. Not as dry as Strongbow or Blackthorn, Magners cider delivers in both length and apple intensity for a refreshing and crisp taste.

PARTNERSHIPS

As the UK's 4th best attended sporting event, The Cheltenham Festival draws in 260,000 attendees and garners a broadcast reach of 3.5 million viewers. Magners supports a media partnership with Talksport Radio with 2,895,000 weekly listeners and their Magners sponsored posters reach an audience of 3 million on the London Underground.



ROOTED IN SOMERSET

HISTORY

Orchard Pig started back in the noughties when Andrew Quinlan began dabbling with cider making in his garden shed back in 2004 in Somerset.

QUALITY

Orchard Pig is a scrumptious cider that broke the mould in a traditional-led market. They have a motto of 'no apples and no trees', instead focusing on creating a bold, mischievous brand like no other... that is all about the cider.

PARTNERSHIPS

Orchard Pig Reveller is a crisp, refreshing and lightly sparkling cider with a hearty aroma of west country apples and a tangy note of freshly squeezed apples.

Orchard Pig will continue its mantra of "GO PIG OR GO HOME" through its partnership with the meatless farm, guerrilla marketing, cheeky voice and mischievous tone to disrupt the cider market.



+7.6%

Magners Original draught is growing by +7.6% value sales.



#1

Brand affinity of any apple cider brand.



#1

Magners Original is the #1 packaged apple cider by volume and value sales.

AVAILABLE POS



glassware



coaster



bar runner



parasol



table talkers



t-shirt



#1

Consideration and recommendation of any apple cider brand.*



+22.5%

Value sales growth MAT (moving annual total).**



+24.6%

Average price per pint of £4.14 (+24.6% higher than the market leader).

AVAILABLE POS



glassware



coaster



bar runner



sharing board

SUPER PREMIUM



A FIVE STAR TASTE OF MADRID SINCE 1890

HISTORY

Born in Madrid in 1890, Mahou was named after its founder and has passed on through seven generations of passionate Master Brewers. Mahou Cinco Estrellas is the flagship of the family, the highest expression of brewing excellence and an icon of Spanish culture and lifestyle.

BRAND VALUES

Mahou origin represents what we stand for: an unmistakable Five Star Taste, as a result of the tireless effort of Master Brewers. Ingredients, brewing process and pouring are controlled to the maximum detail to deliver a perfectly balanced, full-bodied and refreshing lager. Loved in Spain, renowned worldwide.

QUALITY

Quality is also result of a unique Master Serve, called Maestria. Mahou beers use a 3-way tap that creates a soft, compact and creamy foam. This cream acts as a lid to prevent the beer coming into contact with the air to maintain the Five Star taste until the very last drop. This pour is not just a signifier of identity for Mahou, but also an icon of the Madrid lifestyle: the "cañas".

Mahou

Madrid 1890

MAHOU
5.4%



#1

Mahou is the #1 best selling beer in Spain.



+4PP

Draught world lager drives strong share gain (+4pp vs. 2019) and incremental category RoS for an outlet with up to 4 different SP world lager brands.



+14%

On average, Mahou consumers drink +12% more than world lager consumers and are willing to spend +14%.

AVAILABLE POS



glassware



coaster



bar runner



parasol



A board



standee



wallboard



AND THAT'S NOT ALL...

LEFFE BLONDE 6.6%
SPECIALITY, WHEAT

LEFFE BRUNE 6.5%
SPECIALITY, WHEAT

SPATEN 5.2%
SPECIALITY, LAGER

LOWENBRAU 5.2%
SPECIALITY, LAGER

FRANZISKANER 5% | Alcohol Free 0%
SPECIALITY, WHEAT

PACIFICO 4.5%
WORLD, LAGER

BRAHMA 4.3%
WORLD, LAGER

MODELO 4.5%
WORLD, LAGER

BATHTUB GIN 43.3%
BEYOND BEER

HOEGAARDEN 4.9%
SPECIALITY, WHEAT

BASS ALE 4.4%
ALE

CAMDEN IPA 5.8% (original and over) Ink 4.4%
CRAFT, IPA & STOUT

LISA 5%
CRAFT, LAGER

BUD LIGHT SELTZER 4%
BEYOND BEER

BODDINGTONS 4.6%
ALE

STELLA CIDRE 4.5%
CIDER

ADDLESTONES 5.2%
CLOUDY CIDER

MIKE'S HARD SELTZER 5%
BEYOND BEER

CUBANISTO 5.9%
WORLD, RUM-FLAVOURED LAGER

MAGNERS Light 4.5% | Rosé 4% | 0.0%
CIDER

ORCHARD PIG Truffler 6% | Charmer 6% Hog Father 7.4%
CIDER

BABE Grigio 12% | Rosé 12% | Red 12.5%
BEYOND BEER

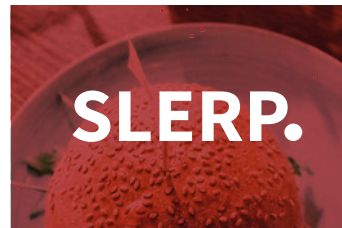


BT SPORT



Capitalise on the return of live sport with our **exclusive BT Sport subscription deal.**

SLERP



We've partnered with SlERP, a **leading e-commerce platform, to enable our partners to offer mobile pay-at-table ordering, click & collect and home delivery.**

OPUS ENERGY



Discover **our discounted green energy tariff in partnership with Opus Energy.** It's designed to reduce energy bills and enable your business to operate sustainably.

BOOST YOUR BUSINESS



Join the **digital loyalty programme supporting and rewarding our on trade partners** for stocking our brands. Exclusive rewards, offers and content to reduce your costs and grow your business.

Budweiser

DRINKS DISPENSE

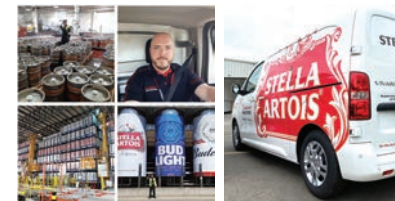
On 1st April 2020, we moved our drinks dispense team back in-house. Our dedicated BDD team now includes 93 technicians, including 7 senior technicians.

This team is ready to undertake over 20000 installs, which equates to a total annual installation of 30000 new taps. They attend 70000 service calls, ensuring your taps are pouring all year round.

Our planning team is now formed of 10 planners who work across 7 regional areas, and we have 2 dedicated project planners who will ensure smooth project implementation every time.

Our contact **telephone number** remains the same, please call us on: **08457 100600**

For any **service queries**, relating to breakdowns or installs, please contact us via: **drinksdispense@ab-inbev.com**



STEP 1

Budweiser rep agrees new brand with owner of venue.



STEP 2

Budweiser rep logs the install details on Job Logic.



STEP 3

Our drinks dispense planner calls the owner using contact details provided and books in a suitable date for survey and/or install.



STEP 4

Our drinks dispense technician attends survey and/or install at the agreed time

The Customer, Wholesaler and Sales can have Live Notifications of the Job Status sent via Email



STEP 5

Agreed install takes place and a quality check is completed on all other Budweiser Brewing Group brands pouring.



STEP 6

1 x box of glassware is provided by the Technician for Stella Artois, Budweiser, Bud Light, Becks, Goose Island and Corona and sent in for other brands by the sales rep.



STEP 7

A customer satisfaction survey will complete the technician's site visit.

Budweiser

BREWING GROUP UK&I™

A PROUD PART OF **ABInBev**